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# THE PRE-WAR COMMERCE AND THE COMMERCIAL APPROACHES OF THE BALKAN PENINSULA\*

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The purpose of this paper is to present, with some approach to accuracy, the general characteristics of the commerce of the Balkan Peninsula. The student of the problems of the separate states finds himself, inevitably, drawing comparisons between them and seeking a broader basis for his study than the conditions of a single country afford him. He recognizes a general problem underlying the varied national questions. He demands a survey of the whole. The demand is reasonable and should be given more consideration than it has yet received, although, as will appear, it can be satisfied only in part.

## THE FIELD COVERED IN THIS SURVEY

The investigator who seeks to treat the commerce of the Balkan Peninsula as a whole finds serious gaps in the commercial statistics on which his work must be based. The figures of Turkish commerce were thoroughly unreliable before 1910, when a new system of determining values and quantities by declaration went into effect.<sup>1</sup> Even after that date the figures are given in such a form as to render difficult the distinction of European and Asiatic total trade and to make impracticable the distinction of individual items in the European trade. The total imports of Turkey in Europe in 1910 exceeded those of any other country in the peninsula and made up about one-third of the total imports of all Balkan countries; the exports were much less important, composing less than one-fifth of the total.<sup>2</sup> Unfortunately the form in which the Turkish figures are supplied

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<sup>1</sup> An account of the change is given in British *Diplomatic and Consular Repts.*, Ann. Ser. No. 4835 [Cd. 6005-3] and No. 5045 [Cd. 6665-3]. Figures of Turkish trade cited in the text are taken from "Turkey: Report for the Year 1912 on the Trade of the Consular District of Constantinople," *Diplomatic and Consular Repts.*, Ann. Ser. No. 5045 [Cd. 6665-3], London, 1913.

<sup>2</sup> The trade of European Turkey in 1910, from the figures of the British report reduced to round millions of francs, was as follows:

	IMPORTS	EXPORTS
Adriatic ports .....	21	13
Saloniki .....	103	24
Kavala, Üsküb, etc. ....	22	14
Dedeagach.....	14	6
Adrianople, Porto Lagos, etc. ....	20	9
Constantinople, Stambul, Galata.....	306	50
Total .....	486	116

To this should be added an estimate of the trade of the European ports of the Sea of Marmara and, a much more important item, trade subject to the Public Debt Administration and to the Imperial Tobacco Régie. Exports under this last head amounted, for the whole empire, to about 75,000,000 francs.

makes it impossible to include them in the detailed analysis on which this paper is based.

The northwestern part of the peninsula must also be omitted from the survey. Material exists on which rough estimates of the trade of Dalmatia could be framed, and relatively good commercial statistics are supplied for Bosnia and Hercegovina,<sup>3</sup> but it does not appear profitable to attempt to include either these districts or the independent state of Montenegro, whose commerce is relatively insignificant, in the comparison.

#### METHOD EMPLOYED IN COMPILATION OF STATISTICS

The conclusions of this paper, therefore, are based on the commercial statistics of four countries of the Balkans: Rumania, Bulgaria, Serbia, and Greece. These statistics, compiled in a form suited to a summary survey, are presented in Tables I-VIII. They relate to the years 1910 and 1911, giving an average of the two years. The period covered seems now far distant, but is actually the most recent period in which peace prevailed and in which normal commercial relations can be studied.

It is difficult to group together, for the purpose of a survey, the commercial statistics of the four separate countries, and I have simplified the process, at the expense of ideal accuracy, by treating only the principal items of import and export. Differences of classification and of nomenclature in the statistics of the separate countries, together with the overwhelming detail of the primary statistical sources, make it impracticable for the private investigator to fuse all the different figures into one mass and then recast the unified statistics according to the plan which appears to him to bring out best their significance. I have chosen five groups—agricultural products, animal products, forest products, minerals, and manufactures—and have classified the principal items under those heads. The sum of these items amounts to about 70 per cent of the value of the total imports and approaches 90 per cent of the value of the total exports. The remaining items are great in number but of little importance taken separately; these items are not distinguished in my analysis.

In the years named the total trade, combining imports and exports, of the four leading countries was valued at about 2,000,000,000 francs a year, considerably less than one per cent of the total trade of the world. These

<sup>3</sup> These are published by the Landesregierung, Sarayev, and, after the delay of some years, are summarized in *Oesterreichische Statistik*. Fortunately an article by Dr. A. Korompay, published in the Austrian *Statistische Monatschrift*, Vol. 40, 1914, Vienna, just before the outbreak of the war, gives figures for 1910 and 1911. The significant figures for Bosnia and Hercegovina in 1910 are as follows, in millions of Austrian crowns (roughly equivalent to francs):

	IMPORTS	EXPORTS
Raw and semi-manufactured materials,		
for use in industry.....	3	39
for consumption.....	29	51
Manufactured wares.....	113	43
Total.....	145	133

four countries together outranked in commercial importance Portugal or Finland or Norway but counted for less in world trade than Sweden or Spain or even the little country of Denmark.<sup>4</sup> If the figures for Rumania be excluded, on the ground that that country belongs rather to the Continent than to the Peninsula, the total commerce of the Peninsula would be cut in half.

#### CHARACTER OF EXPORTS

Considering first the exports of the four Balkan countries named above, the striking feature is the immense preponderance of agriculture over other branches of production (Table II). Agricultural products composed three-fourths of the value of the whole. Animals and animal products (eggs, hides, meat, etc.) when added bring the aggregate farm products, as they may be called, up to four-fifths of the total value of the exports. The products of the forest, the mine, and the factory would at most, therefore, compose one-fifth of the total exports but in fact were probably not much more than half of that. The lumber and the petroleum of Rumania and the mineral ores of Greece are practically the only items in the list worth separate enumeration. I have purposely framed the list so as to include under agriculture those products, like flour and olive oil, which are often classed as manufactures but which seem to me misplaced and misleading when put under that head. Actually the perfume industry of Bulgaria, with its product of attar of roses, appears in my tables as the only export industry of any account under the head of manufactures, contributing six-tenths of one per cent to the total value of the Balkan exports in 1910-1911; a critic might well urge that that industry also, by reason of the primitive character of the equipment and processes employed, ought not to be counted as a manufacture in the usual modern sense.<sup>5</sup>

#### CHARACTER OF IMPORTS

The reverse of this picture is presented by the table of imports into the Balkan countries (Table IV). Less than one-tenth of the total is composed of those agricultural products sufficiently important to be separately enumerated. The larger part of this sum is composed of the one item of grain imported into Greece, which alone among the Balkan countries has a serious deficiency of this necessary foodstuff. Other items are scattering and relatively unimportant: coffee, sugar, olives, and olive oil.

<sup>4</sup> See comparative figures in marks in *Statistisches Jahrbuch für das Deutsche Reich*, Vol. 35, 1914, Berlin, Appendix, Table 38.

<sup>5</sup> A classification different from that employed in the British compilations on which my tables are based would bring other manufactured items into the list of exports. Bulgaria, for example, shows an export of "textile materials and products" somewhat larger in value than the export of perfumery. That part of the export, however, which represents a finished manufacture is made up of coarse woolens such as *chayak* and *abas*, domestic products exported mainly to Turkey; the item of finished cloths is inconsiderable. Cf. *Annuaire Statistique du Royaume de Bulgarie* 1910, Sofia, 1911, pp. 297, 325, 331.

Two points stand out when the agricultural imports of the Balkan countries are analyzed. The first is the non-appearance of raw materials for manufacturing industry. Raw cotton, for example, appears in the list, but as an insignificant item, contributing only about one-third of one per cent of the total value of the imports. The second is the small purchase which

TABLE I.—COMMERCE OF BALKAN COUNTRIES, 1910-1911 (Average): EXPORTS \*  
(Values in thousands of francs)

	Rumania	Bulgaria	Serbia	Greece	All
AGRICULTURAL PRODUCTS .	540,220	104,647	51,058	96,307	792,232
Food					
Grain .....	522,785	97,736	35,254	48,982	655,775
Fruits .....			15,804		64,786
Haricots .....	14,124	4,948			19,072
Tobacco .....				14,880	14,880
Wine .....				14,588	14,588
Cognac .....				2,362	2,362
Olive oil, olives..				15,495	15,495
Peas .....	2,185				2,185
Sugar .....	1,126				1,126
Colza .....		1,963			1,963
Raw Material					
ANIMAL PRODUCTS	14,863	24,708	21,689	3,241	64,510
Food					
Animals .....	5,708	6,206	8,912		20,826
Eggs .....	3,870	11,241			15,111
Meat .....			9,194		9,194
Fish .....	1,329		3,854		1,329
Cheese .....					3,854
Raw Material					
Hides .....	2,271	3,407	3,592	2,096	11,366
Wool, raw .....	1,685				1,685
Sponges .....				1,145	1,145
FOREST PRODUCTS.	24,258	392			26,444
Wood .....	24,258	392			24,650
Valonia .....					1,794
MINERALS .....	38,977			18,345	57,322
Petroleum products .....	38,977			18,345	38,977
Mineral ores .....					18,345
MANUFACTURES ..					
Textile		3,247	856		4,103
Wool mfrs .....		3,247			3,247
Cordage .....			856		856
Other					
Perfumes .....		6,448	6,448		6,448
TOTAL PRINCIPAL	618,318	139,442	73,612	119,687	951,059
TOTAL EXPORTS ..	654,113	156,843	107,707	142,737	1,061,399

\* Tables I to VIII compiled by Dr. Grace Fuller, Yale University Library, from tables in *Statistical Abstract for the Principal and Other Foreign Countries* [Cd. 7525], London, 1914, pp. 172-183 and 288-295.

these countries can afford to make of food luxuries like sugar and coffee I have calculated by a rough-and-ready method the consumption of those commodities in the years in question and find that the average inhabitant consumed of coffee less than one pound a year, of sugar about eight pounds. The figures for the United States are almost exactly ten-fold that, for either article.<sup>6</sup>

<sup>6</sup> I derived the figures from the imports of 1910-1911, corrected only by taking account of the sugar product and export of Rumania. The exceptionally large output of sugar in Rumania, 1910-1911, would, I am sure, more than make up for the omission of the product of the other Balkan states. Cf. *Statistisches Jahrbuch*, Vol. 35, 1914, Appendix, Table 15. American figures are to be found in *Statistical Abstract of the United States*, No. 36, 1913, pp. 671-672, Table 347.

The Balkan countries imported notably small amounts also of the products of animal industry, forestry, and mining. The sum of these imports, of which coal is the chief item, was about the same as that of the agricultural products, about ten per cent of the total.

There is, it will be remembered, in the figures of imports which I have

TABLE II.—COMMERCE OF BALKAN COUNTRIES, 1910-1911 (Average): EXPORTS  
(*Percentage of value*)

	Rumania		Bulgaria		Serbia		Greece		All	
<b>AGRICULTURAL PRODUCTS....</b>	82.5	.....	66.5	.....	47.7	.....	67.5	.....	73.97	.....
<i>Food</i>										
Grain and flour....	.....	79.5	.....	62.5	.....	32.9	.....	34.4	.....	61.18
Fruits .....	.....	.....	.....	.....	.....	14.75	.....	.....	.....	6.1
Haricots .....	.....	2.16	.....	3.16	.....	.....	.....	.....	.....	1.79
Tobacco .....	.....	.....	.....	.....	.....	.....	.....	.....	.....	1.4
Wine .....	.....	.....	.....	.....	.....	.....	.....	.....	.....	1.37
Cognac .....	.....	.....	.....	.....	.....	.....	.....	.....	.....	.22
Olive oil, olives....	.....	.....	.....	.....	.....	.....	.....	.....	.....	1.46
Peas .....	.....	.33	.....	.....	.....	.....	.....	.....	.....	.21
Sugar .....	.....	.17	.....	.....	.....	.....	.....	.....	.....	.06
Colza .....	.....	.....	.....	1.25	.....	.....	.....	.....	.....	.18
<i>Raw Material</i>										
<b>ANIMAL PRODUCTS....</b>	2.27	.....	15.78	.....	20.17	.....	2.26	.....	6.02	.....
<i>Food</i>										
Animals .....	.....	.89	.....	3.96	.....	8.3	.....	.....	.....	1.96
Eggs .....	.....	.59	.....	7.2	.....	.....	.....	.....	.....	1.42
Meat .....	.....	.....	.....	.....	.....	8.57	.....	.....	.....	.86
Fish .....	.....	.2	.....	.....	.....	.....	.....	.....	.....	.12
Cheese .....	.....	.....	.....	2.46	.....	.....	.....	.....	.....	.36
<i>Raw Material</i>										
Hides .....	.....	.35	.....	2.18	.....	3.35	.....	1.47	.....	1.04
Wool, raw....	.....	.25	.....	.....	.....	.....	.....	.....	.....	.16
Sponges .....	.....	.....	.....	.....	.....	.....	.....	.8	.....	.11
<b>FOREST PRODUCTS....</b>	3.7	.....	.29	.....	.....	.....	1.25	.....	2.49	.....
Wood .....	.....	3.7	.....	.29	.....	.....	.....	.....	.....	2.32
Valonia .....	.....	.....	.....	.....	.....	.....	.....	1.25	.....	.17
<b>MINERALS....</b>	5.95	.....	.....	.....	.....	.....	12.8	.....	5.3	.....
Petroleum products	.....	5.95	.....	.....	.....	.....	.....	.....	.....	3.66
Mineral ores....	.....	.....	.....	.....	.....	.....	.....	12.8	.....	1.72
<b>MANUFACTURES....</b>										
<i>Textile</i> .....	.....	.....	2.3	.....	.8	.....	.....	.....	.....	.39
Wool mfrs....	.....	.....	.....	2.3	.....	.....	.....	.....	.....	.32
Cordage .....	.....	.....	4.25	.....	.....	.8	.....	.....	.....	.08
<i>Other</i> .....	.....	.....	.....	4.25	.....	.....	.....	.....	.....	.6
Perfumes .....	.....	.....	.....	.....	.....	.....	.....	.....	.....	.6
<b>PERCENTAGE PRINCIPAL....</b>	94.5	94.09	89.12	89.55	68.67	68.67	83.81	83.82	89.30	88.87

used an undistributed residuum amounting to 30 per cent of the total value, which would doubtless add considerably to the significance of all these classes if it could be properly apportioned among them. It could not, in any event, so change the balance as to give any one of these classes of imports an importance equal to that of the single class of manufactures, which remains to be considered.

The principal items alone, in the class of manufactured wares, amount to nearly one-half (47.8 per cent) of the total imports. They comprise, of course, a varied assortment, supplied by all the different kinds of factories which have developed in modern industrial regions. To one who is interested in the progress of the Balkans the most hopeful feature appears in

the prominence of the metal manufactures among the imports, amounting to about one-fifth of the total purchases made abroad. If, as is the case, the Balkan countries are doing very little as yet to supply their own needs

TABLE III—COMMERCE OF BALKAN COUNTRIES, 1910-1911 (Average): IMPORTS  
(Values in thousands of francs)

	Rumania	Bulgaria	Serbia	Greece	All
AGRICULTURAL PRODUCTS	15,220	16,441	3,955	53,295	88,911
Food					
Grain	2,576	2,826	1,407	44,026	48,259
Coffee		2,340	1,310	3,323	9,549
Sugar		5,538	421	3,718	9,677
Olive oil, olives	5,961	2,399	211		8,571
Fruits	4,696	2,028			6,724
Tobacco	1,982				1,987
Wine			606		606
Raw Material					
Cotton, raw		1,310		2,228	3,538
ANIMAL PRODUCTS	21,354	5,927	5,300	14,266	46,847
Food					
Fish	5,494			7,166	12,660
Animals	4,575			3,271	7,846
Raw Material					
Hides	5,790	5,927	4,015	3,829	19,561
Wool, wool yarn	5,495		1,285		6,780
FOREST PRODUCTS		6,025	1,082	4,725	11,832
Wood		6,025	1,082	4,725	11,832
MINERALS	7,654	8,414	3,068	19,659	38,795
Coal and coke	7,654	4,057		17,390	29,101
Oil, mineral		3,263	783	1,085	5,131
Salt		1,094	2,285		3,379
Potash, soda, salt peter				1,184	1,184
MANUFACTURES	126,897	37,105	23,637	17,256	204,895
Textile		24,352	12,570	7,411	45,289
Cotton yarn		45,453	16,394	8,810	81,514
Cotton		32,551	6,089	4,315	47,486
Woolen		16,531			17,443
Silk				912	1,495
Linen					6,567
Wearing apparel		3,400	1,561	1,606	4,610
Jute		4,610			491
Cordage and twine			491		
Metal	144,168	28,793	22,006	2,743	197,710
Iron and steel		70,349	13,871	12,701	99,664
Other metals				3,382	3,382
Machinery		49,187	14,922	5,923	70,032
Vehicles		24,632			24,632
Other	28,758	9,354	10,553	6,718	55,384
Leather, leather manufactures		13,022	2,127	2,363	
Chemicals and drugs		8,881		4,182	13,063
Caoutchouc mfrs.		6,855			6,855
Glass, glassware, earthenware			2,375	1,157	5,498
Paper			3,026	2,650	10,428
Soap			1,826	202	2,028
TOTAL PRINCIPAL...	344,051	112,059	69,602	118,662	644,374
TOTAL IMPORTS...	489,731	188,351	100,061	167,023	945,166

for tools and machinery, they showed at least an appreciation of these needs and an inclination to invest their savings in durable instruments to further their efficiency as producers. If they had been granted ten years of peace since 1910-1911, instead of ten years of war, and had continued to spend

abroad, as they were doing then, some \$40,000,000 a year for metals, tools, and machinery, they would be today in a position very different from that which they actually occupy.

TABLE IV.—COMMERCE OF BALKAN COUNTRIES, 1910-1911 (Average): IMPORTS  
(Percentage of value)

	Rumania	Bulgaria	Serbia	Greece	All
AGRICULTURAL PRODUCTS					
Food	3.1	8.73	4.	31.97	9.8
Grain	.....	1.48	1.41	26.4	5.26
Coffee	.53	1.25	1.3	1.98	1.1
Sugar	1.22	3.	.42	2.22	1.2
Olive oil, olives	1.95	1.3	.21	.....	.9
Fruits	.95	1.	.....	.....	.71
Tobacco	.4	.....	.....	.....	.24
Wine	.....	.....	.6	.....	.06
Raw Material					
Cotton, raw	.....	.7	.....	1.37	.37
ANIMAL PRODUCTS	4.3	3.1	5.3	8.56	5.13
Food	1.12	.....	.....	4.3	1.33
Fish	.93	.....	.....	1.96	.78
Animals	.....	.....	.....	.....	.....
Raw Material	1.18	3.1	4.	2.3	2.3
Hides	1.12	.....	1.3	.....	.72
Wool, wool yarn	.....	.....	.....	.....	.....
FOREST PRODUCTS	.....	3.2	1.	2.8	1.24
Wood	.....	3.2	1.	2.83	1.24
MINERALS	1.54	4.5	3.	11.7	4.
Coal and coke	1.54	2.14	.....	10.4	3.01
Oil, mineral	.....	1.76	.78	.....	.54
Salt	.....	.58	2.3	.....	.36
Potash, soda, salt-peter	.....	.....	.....	.72	.12
MANUFACTURES					
Textile	25.76	19.	23.6	10.4	21.13
Cotton yarn	4.95	6.5	7.4	.57	4.8
Cotton	9.3	8.57	8.8	6.5	8.6
Woolen	6.6	3.2	4.3	2.78	4.5
Silk	3.35	.....	.....	.54	1.83
Linen	.....	.....	1.5	.....	.16
Wearing apparel	.69	.82	1.6	.....	.7
Jute	.92	.....	.....	.....	.49
Cordage and twine	.....	.26	.....	.....	.05
Metal	29.4	15.2	22.	1.7	20.9
Iron and steel	14.3	7.3	12.7	1.73	10.55
Other metals	.....	.....	3.4	.....	.36
Machinery	10.	7.9	5.9	.....	7.4
Vehicles	5.1	.....	.....	.....	2.6
Other	5.9	5.	10.6	4.	5.8
Leather, leather manufactures	.....	1.12	2.4	.....	1.8
Chemicals and drugs	2.6	.....	4.2	.....	1.32
Caoutchouc mfrs.	1.9	.....	.....	.....	.72
Glass, glassware, earthenware	1.4	.....	.....	.....	.....
Paper	.....	1.25	1.1	1.17	.58
Soap	.....	1.7	2.7	2.85	1.12
TOTAL PRINCIPAL	69.64	70.1	58.5	59.08	67.55
			68.7	69.5	70.9
				71.27	68.09

Another group of imported manufactures, about equal in importance to that of the metals, is that of textile products, in which cotton yarn and cloth were the outstanding items. Luxury products, such as silk and linen, were bought in relatively small quantities, and the average inhabitant had but seven cents a year to squander on imported wearing apparel. We may assume, of course, that clothes were made at home, and by like reasoning

we can explain the fact that the average inhabitant spent only two cents a year for imported soap. Unfortunately we cannot make such a liberal allowance for the domestic supply of paper and must note as one of many signs of social backwardness that the average inhabitant spent but twelve

TABLE V.—COMMERCE OF BALKAN COUNTRIES, 1910-1911 (Average): IMPORTS FROM OTHER COUNTRIES  
(Values in thousands of francs)

FROM	INTO				
	Rumania	Bulgaria	Serbia	Greece	All
Austria-Hungary . . . . .	117,510	47,893	31,798	21,702	218,903
Germany . . . . .	161,017	36,978	33,162	13,648	244,805
United Kingdom . . . . .	71,186	26,358	10,474	37,676	145,694
France . . . . .	30,494	20,138	4,675	10,151	65,458
Belgium . . . . .	21,048	6,777	1,491	3,028	32,344
Netherlands . . . . .	5,312	2,005	634	3,832	11,783
Italy . . . . .	25,168	7,981	4,253	6,665	44,067
Russia . . . . .	12,656	6,920	2,608	35,245	57,429
Rumania . . . . .	· · · · ·	7,648	1,359	2,616	11,623
Bulgaria . . . . .	1,366	· · · · ·	590	10,910	12,866
Serbia . . . . .	381	2,010	· · · · ·	· · · · ·	2,391
Greece . . . . .	1,834	454	356	· · · · ·	2,644
Bosnia . . . . .	· · · · ·	· · · · ·	214	· · · · ·	214
Montenegro . . . . .	· · · · ·	· · · · ·	57	· · · · ·	57
Turkey and Egypt . . . . .	13,951	18,505	4,875	10,950	48,281
Spain . . . . .	580	· · · · ·	· · · · ·	· · · · ·	580
Norway and Sweden . . . . .	· · · · ·	372	· · · · ·	· · · · ·	372
Switzerland . . . . .	9,628	1,708	1,760	383	13,479
United States . . . . .	3,258	1,275	1,573	4,177	10,283
Other countries . . . . .	9,341	1,329	182	6,040	16,892
TOTAL . . . . .	489,730	188,351	100,061	167,023	940,165

TABLE VI.—COMMERCE OF BALKAN COUNTRIES, 1910-1911 (Average): IMPORTS FROM OTHER COUNTRIES  
(Percentage of values)

FROM	INTO				
	Rumania	Bulgaria	Serbia	Greece	All
Austria-Hungary . . . . .	24.	25.4	31.79	12.95	23.2
Germany . . . . .	33.	19.5	13.16	8.2	25.9
United Kingdom . . . . .	14.5	13.9	1.05	22.6	15.38
France . . . . .	6.25	10.6	4.7	6.05	6.95
Belgium . . . . .	4.3	3.58	.15	1.8	3.42
Netherlands . . . . .	1.09	1.06	.06	2.29	1.12
Italy . . . . .	5.15	4.2	4.25	4.	4.65
Russia . . . . .	2.6	3.66	2.61	21.2	6.15
Rumania . . . . .	· · · · ·	4.5	1.36	1.56	1.23
Bulgaria . . . . .	.28	· · · · ·	.59	6.51	1.35
Serbia . . . . .	.08	1.06	· · · · ·	· · · · ·	.25
Greece . . . . .	.37	.24	.36	· · · · ·	.28
Bosnia . . . . .	· · · · ·	· · · · ·	.21	· · · · ·	.02
Montenegro . . . . .	· · · · ·	· · · · ·	.06	· · · · ·	.006
Turkey and Egypt . . . . .	2.35	9.8	4.87	6.15	5.1
Spain . . . . .	.12	· · · · ·	· · · · ·	· · · · ·	.06
Norway and Sweden . . . . .	· · · · ·	.20	· · · · ·	· · · · ·	.04
Switzerland . . . . .	1.96	.9	1.76	.23	1.42
United States . . . . .	1.69	.67	1.57	2.5	1.6
Other countries . . . . .	1.91	.69	.18	3.62	1.8
TOTAL . . . . .	99.65	99.96	68.73	99.66	99.92

cents a year for imported paper of all sorts.

#### SUMMARY OF BALKAN TRADE

If we attempt now to sum up the character of Balkan trade we may make a composite picture somewhat like the following. The average inhabitant appears as a farmer raising a surplus of food crops which he

markets abroad. This surplus is not very large—almost exactly 61 francs, say \$12.00. To him it is of considerable importance, however, for he has not yet learned to make for himself the conveniences of life which are the product of modern machinery and sends this surplus abroad to buy them. He has some debts to pay, which eat up about \$1.00 of the surplus, leaving

TABLE VII.—COMMERCE OF BALKAN COUNTRIES, 1910-1911 (Average): EXPORTS TO OTHER COUNTRIES  
(Values in thousands of francs)

To	FROM				
	Rumania	Bulgaria	Serbia	Greece	All
Austria-Hungary .....	50,079	9,197	33,128	12,588	104,992
Germany .....	28,645	18,565	25,424	15,730	88,364
United Kingdom .....	44,743	19,776	879	33,431	98,829
France .....	47,877	10,079	2,516	14,601	75,073
Belgium .....	244,855	37,367	11,139	9,518	302,879
Netherlands .....	88,009	1,694	155	10,541	100,399
Italy .....	59,132	2,883	2,732	9,172	73,919
Russia .....	6,617	318	34	3,282	10,251
Rumania .....	.....	1,058	6,355	1,071	8,484
Bulgaria .....	5,668	.....	3,467	.....	9,135
Serbia .....	737	509	.....	.....	1,246
Greece .....	851	9,495	110*	.....	10,456
Bosnia .....	.....	.....	116	.....	116
Montenegro .....	.....	.....	17	.....	17
Turkey and Egypt .....	31,573	36,747†	17,728†	16,134	102,182
Spain .....	4,024	.....	.....	.....	4,024
Switzerland .....	153	222	158	.....	533
United States .....	254	1,142	.....	11,550	12,946
Other countries .....	40,896	7,791	3,750	5,118	57,555
TOTAL .....	654,113	156,843	107,708	142,736	1,061,400

† Does not include Egypt. \* 1911 only; figures for 1910 not given.

TABLE VIII.—COMMERCE OF BALKAN COUNTRIES, 1910-1911 (Average): EXPORTS TO OTHER COUNTRIES  
(Percentage of value)

To	FROM				
	Rumania	Bulgaria	Serbia	Greece	All
Austria-Hungary .....	7.65	5.85	30.8	8.8	9.8
Germany .....	4.4	11.8	23.6	11.	8.3
United Kingdom .....	6.8	12.6	.82	23.4	9.3
France .....	7.3	6.4	2.32	10.2	7.1
Belgium .....	37.5	23.8	10.3	6.7	28.2
Netherlands .....	13.5	1.08	.14	7.39	9.4
Italy .....	9.	1.83	2.52	6.4	7.
Russia .....	1.01	.2	.03	2.3	.96
Rumania .....	.....	.66	5.9	.75	.8
Bulgaria .....	.86	.....	3.2	.....	.86
Serbia .....	.11	.35	.....	.12	.12
Greece .....	.13	6.1	.1	.....	.98
Bosnia .....	.....	.....	.108	.....	.01
Montenegro .....	.....	.....	.01	.....	.....
Turkey and Egypt .....	4.8	23.4	15.9	11.2	9.6
Spain .....	.61	.....	.....	.....	.38
Switzerland .....	.02	.14	.15	.....	.04
United States .....	.04	.75	.....	8.07	1.22
Other countries .....	6.25	4.95	3.5	3.58	5.45
TOTAL .....	99.98	99.91	99.398	99.91	99.52

\$11.00 that he lays out on barbed wire, bar iron, shovels, and plows; on calico and canvas; and, to a very modest extent, on some simple table luxuries.

This picture makes more intelligible to my mind some features in the direction of Balkan commercial currents which are striking and which at

first glance appear puzzling. The countries of the peninsula did little business among themselves or with most of their immediate neighbors. They did little business with distant continents. They carried on most of their trade, about three-quarters of the total, with the countries to the north and northwest, of which only one is immediately adjacent.

In this aspect the Balkan country clearly resembles the farmer. Farmers do little trading among themselves. The possessor of a good orchard or of a particular vineyard will find in the neighborhood some sale for his surplus product, but the farming class as a whole looks to the city for its

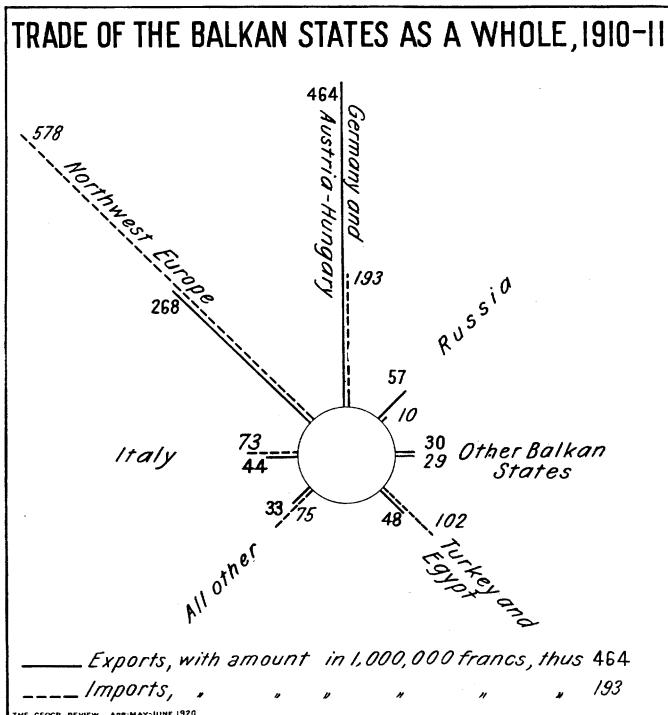


FIG. 1.—Diagram showing the amount and the destination and provenance of the exports and imports of the Balkan states as a whole, 1910-1911. (N. B.: The symbols for exports and imports should be reversed.)

market and its source of supplies. To the Balkan farmer the city is the dense industrial population of northwestern Europe, demanding bread and meat and offering manufactured wares in payment.

Similar considerations help to explain the anomalous distribution of exports and imports along the axes of greatest commercial activity, to the north and northwest. The Balkan exports to northwestern Europe were more than double the imports from that source; the imports from Germany and Austria-Hungary were more than double the exports to that market (Fig. 1). Why is there not a closer approximation to a balance in the

trade with each particular region? As regards exports the answer can be given with some confidence. The British and Belgians and Dutch welcome bread and wheat and are glad to get it from any source. The Germans and Austrians have much farm land of their own and put in the way of food imports obstacles that are sufficient to divert part at least of the trade current of those articles to other countries.

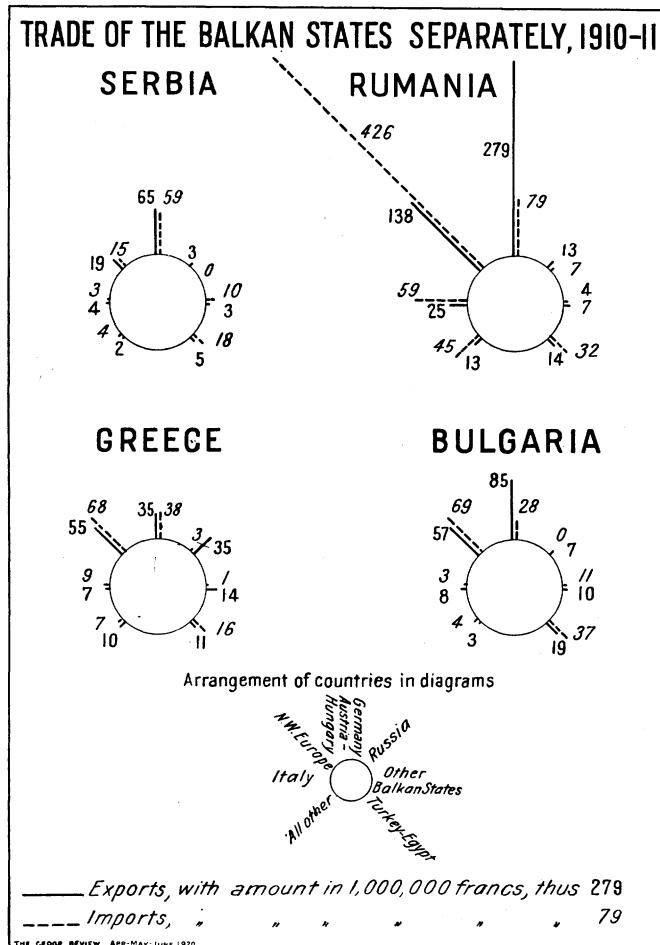


FIG. 2.—Diagram showing the amount and the destination and provenance of the exports and imports of the Balkan states separately, 1910-1911. (N. B.: The symbols for exports and imports should be reversed.)

#### COUNTRIES TRADED WITH

As regards imports into the Balkans, of which almost exactly one-half come from Germany and Austria-Hungary, the answer is less obvious. These imports are, with negligible exceptions, standard wares, produced by several different countries. Why did not the English or the French or

the Belgians, rather than the German-speaking peoples, supply the goods?

They did in fact do so, in large measure, until a comparatively recent period, in which Germany made an astonishing advance. The reasons for the change are intricate, and I shall merely state a personal opinion without seeking to support it in detail. I am inclined, as will appear later, to regard the element of geographical proximity enjoyed by the German-speaking peoples as an advantage in the Balkan market, but one on the whole of secondary importance. It did not give the Germans a commanding position in the Balkans in the past; it will not necessarily assure them such a position in the future.

The Germans have had the trade because they have wanted it more than other peoples wanted it and have gone after it; it did not come to them of itself. Their commercial travelers have explored the region, studied its wants, bestirred themselves to get the right goods, talked business in the language of the country, and offered generous credit. These facts, rather than geographical position or the bluster of commercial policy or superior industrial efficiency, seem to me to explain the hold which the German-speaking peoples had obtained on the Balkan market.

A student of the commercial geography of the Balkan Peninsula desires, of course, to know not only the general character and volume of the trade currents flowing in and out; he would like to distinguish the path of each current and determine the relative importance of the gateways by which trade enters and leaves the peninsula. He finds, however, that the statistical sources of Balkan governments are neither complete nor uniform, and he must be content with the indications given him by the trade of particular countries, inside and outside the peninsula. Fortunately the two countries which have had the largest part in the commerce of the Balkans, Germany and Austria-Hungary (each having about one-sixth), afford means of reaching some preliminary conclusions in the matter.

#### TRADE WITH AUSTRIA-HUNGARY

Austria-Hungary has been used to distinguish that part of the trade of the monarchy which was carried on by sea, via the Adriatic ports, and

TABLE IX.—TRADE OF AUSTRIA-HUNGARY WITH BALKAN COUNTRIES, 1912  
(*Amounts in millions of crowns*)

COUNTRY TRADED WITH	TOTAL IMPORTS	INCLUDING SEA TRADE	PER CENT OF SEA TRADE	TOTAL EXPORTS	INCLUDING SEA TRADE	PER CENT OF SEA TRADE
Serbia .....	40	0	0	43	0	0
Rumania .....	102	8	8	134	1	1
Bulgaria .....	15	1	7	47	4	9
Greece .....	23	23	100	22	21	95
Turkey in Europe.....	97	78	80	42	34	81
Total.....	277	110	40	288	60	21

\**Statistik des auswärtigen Handels*, 1912, Vol. 1, pp. 990, 1052.

furnishes therefore a means of testing the route of the wares exchanged with an immediate neighbor of some of the Balkan states.

Two countries of the Balkans have in the past been at opposite poles as regards the means of commercial approach to them. One, Serbia, lacking any access to the sea, could be reached only by land routes or by internal waterways. The other, Greece, until May, 1916, lacked any railroad connection with the continental lines and therefore was dependent on the sea for practically all its foreign trade. As regards the other states it is apparent that the farther removed they were from Austria-Hungary the more did the greater expense of rail transport, mile for mile, tell in favor of the sea route.

The fact that sea traffic in the export trade had only half the relative importance it showed in importation is due, of course, to the contrast of raw materials and finished manufactures, presenting a great difference in the value of a given bulk.

The smaller part (one-fifth to two-fifths in value) of the commerce of Austria-Hungary with the Balkan states was carried on by sea. We have now to distinguish, if possible, the relative importance of the railroad and of internal waterways in carrying the bulk of the traffic.

#### HUNGARIAN TRADE

Statistics which would make possible an exact analysis are lacking. It is necessary, in the first place, to omit from consideration the trade of the Kingdom of Hungary with the Balkans. This is not so serious as appears at first, when one thinks of the propinquity of Croatia-Slavonia to Serbia and of Transylvania to Rumania. Actually the trade of the Hungarian half of the monarchy with the Balkan states has been very small. Hungary is too much like the Balkan states in its economic development to give rise to those contrasts in the productive organization from which the gains of trade arise. In the period from 1908 to 1912 it carried on from one per cent to three per cent of its trade with Rumania, from one per cent to two per cent with Bosnia, and only exceptionally as much as one per cent with any other Balkan country.<sup>7</sup> This situation is intelligible when one reviews the leading imports and exports of Hungary. In order of importance (values), in 1912 the exports were flour, oxen, wheat, hogs, wine, raw sugar, rye, barley, timber, oats, refined sugar; these composed half of the total. These products, in general, compete with Balkan products and would find but a poor market in the peninsula. On the other hand, the imports of the Kingdom of Hungary were mainly manufactured wares (textiles, clothing, leather, shoes) and raw materials like coal, cotton, rice, and coffee; the list is much like the list of imports into a Balkan state.<sup>8</sup>

<sup>7</sup> *Ungarisches Statistisches Jahrbuch 1912*, Budapest, p. 224.

<sup>8</sup> *Ibid.*, p. 226 *et seqq.*

## AUSTRIAN TRADE

Even for the Austrian half of the monarchy, however, complete figures are not available. The best that we have are the statistics of the Donau-Dampfschiffahrts-Gesellschaft, the most important navigation company operating on the Danube and its tributaries, carrying certainly more than half of the total tonnage, possibly five-sixths.<sup>9</sup> If we double the figures of the Balkan freight that this company loads and unloads in the Austrian half of the monarchy I believe that we shall have a fair approximation to the total river traffic of Austria-Hungary with Balkan countries, and I have constructed a table (Table X) on the basis, using for comparison the total commercial tonnage of trade, sea-borne and terrestrial, supplied by the commercial statistics. The difference between the figures gives, of course, an approximate idea of the trade carried by the railroads.

TABLE X—TRADE OF AUSTRIA-HUNGARY WITH BALKAN COUNTRIES, 1912 \*  
(Quantities in thousands of metric tons)

	(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)
	TOTAL TRADE OF D-D.G.	RIVER TRADE OF D-D.G.	TOTAL BY RIVER	PER CENT	BY RAIL	PER CENT	BY SEA	PER CENT
<b>IMPORTS FROM</b>								
Serbia .....	175	19.6	39	22	136	78	0	0
Rumania .....	776	17.8	36	5	680	88	60	8
Bulgaria .....	64	7.4	15	23	41	64	8	13
Greece and Turkey .....	199	0.1	0.2	0	28.8	15	170	85
Total.....	1,214	....	90.2	7	885.8	74	238	20
<b>EXPORTS TO</b>								
Serbia .....	188	37.8	76	40	112	60	0	0
Rumania .....	516	19.7	39	7	473	92	4	1
Bulgaria .....	107	15.3	31	29	68	64	8	7
Greece and Turkey .....	137	0.9	2	1	10	7	125	91
Total.....	948	....	148	16	663	70	137	14
<b>TOTAL EXPORTS AND IMPORTS .....</b>	<b>2,162</b>	....	<b>238.2</b>	<b>11</b>	<b>1,548.8</b>	<b>72</b>	<b>375</b>	<b>17</b>

\* Figures for the river trade are taken from *Österreichische Statistische Mitteilungen*, Vol. 7, 1913, p. 86, and refer to the year 1912, as do the figures for total trade and for sea trade taken from *Statistik des auswärtigen Handels*. Figures in column (3) are, of course, mere approximations, and the same must be said of figures under (5), which are remainders obtained by adding the figures under (3), river trade, and (7), sea trade, and subtracting the sum from the figures under (1), total trade. There are obvious objections to fusing statistics of *trade* and of *transportation*, as I have done both for Austria-Hungary and for Germany, but no other means appears by which to reach the end desired.

One feature of this table which appears to me to deserve the greatest emphasis is the indication that it gives of the relative unimportance of the Danube as an avenue of access to Balkan trade. That river traverses the heart of Austria and of Hungary; it provides a direct means of approach to three of the Balkan countries, including Rumania, which has by far the greatest commercial importance of all of them. Yet if we view the Balkan trade of Austria-Hungary in the aggregate the river provides a service which is inferior to that of the sea and immensely less than that of the railroad. Suppose the river to be blocked above its confluence with the

<sup>9</sup>Cf. figures in *Österreich. Statistisches Handbuch* 1909, p. 344 *et seqq.*

Save—how serious would be the effect on the Balkan trade of Austria-Hungary? Commerce with Greece and Turkey would follow the sea route, as in the past. The sea and the railroad, between them, would readily provide carriage for most of the remainder of the trade. The districts most injuriously affected, so far as the statistics show, would be Serbia on the Danube, and Bosnia on the Save; in the aggregate they are not of great importance.<sup>10</sup>

#### TRADE WITH GERMANY

Let us consider now, in a similar manner, the trade of Germany with the Balkans. Germany was in the years 1910-1911 the leading country of the world as regards the value of trade with the four Balkan states whose statistics have been analyzed. Germany has not the peculiar advantage of propinquity enjoyed by Austria-Hungary. It does have some advantage of position over the other industrial states of northwestern Europe; it will be interesting to determine how far these advantages account for its supremacy in Balkan trade. Finally, Germany offers admirable statistical

TABLE XI.—TRADE OF GERMANY AND BALKAN COUNTRIES, 1910 \*  
(In thousands of tons)

	TOTAL TRADE	BY WATER-WAY	PER CENT	BY RAILWAY	PER CENT	REMAIN- DER (BY SEA)	PER CENT
<b>IMPORTS INTO GERMANY FROM</b>							
Rumania .....	550.8	27.6	5	27.9	5	495.3	90
Other Balkan States.....	306.5	68.0	22	32.7	11	205.8	67
Total.....	857.3	95.6	11	60.6	7	701.1	82
<b>EXPORTS FROM GERMANY TO</b>							
Rumania .....	168.6	3.6	2	86.9	52	78.1	47
Other Balkan States.....	263.5	20.5	8	53.5	21	189.5	72
Total.....	432.1	24.1	6	140.4	32	267.6	62
<b>TOTAL EXPORTS AND IMPORTS .....</b>	<b>1,289.4</b>	<b>119.7</b>	<b>8</b>	<b>201.0</b>	<b>16</b>	<b>968.7</b>	<b>75</b>

\* I have compiled the figures for the total trade from *Statistik des Deutschen Reichs*, Vol. 252, *Auswärtiger Handel*, Parts IV and VII, Table A, *Spezialhandel nach Warengruppen*, taking the figures for 1910. Tonnage carried on internal waterways in 1910 is analyzed in the same series, Vol. 245, Part I, *Verkehr der deutschen Binnenwasserstrassen*. Extraordinarily complete figures of traffic by rail are provided in *Statistik der Güterbewegung auf deutschen Eisenbahnen nach Verkehrsbezirken geordnet*; as the last volume available to me was that for 1910, I have taken the other figures also for that year.

<sup>10</sup> Transport by Donau-Dampfschiffahrts-Gesellschaft, 1912:

	Thousands of tons)	
	Imports from	Exports to
Serbia on Danube.....	14.5	37.2
Serbia on Save.....	0.5	0.5
Bosnia.....	22.8	9.7

The commercial statistics of Bosnia-Herzegovina do not distinguish the trade with Austria-Hungary from the trade with other countries but do give the proportions of the total external trade carried by different means of transportation. The following figures are simple averages of the percentage figures of the two years, 1910 and 1911.

#### Bosnia-Herzegovina, 1910-11, percentage of tonnage

	Imports	Exports	Total
Railroads.....	81	72	74
River trade.....	9	17	15
Roads and ferries.....	9	11	10
Direct trade with Serbia, Turkey, Montenegro.....	0.7	0.0	0.2

Cf. A. Korompay: *Der auswärtige Warenverkehr Bosniens und der Herzegowina im Jahre 1911 im Vergleiche mit den Jahren 1910 und 1907*, *Statistische Monatschrift*, Vol. 40, 1914, pp. 232-241; reference on p. 240.

material for a study of its transportation system and is the only Continental state having important commercial relations with the Balkan countries that gives definite information on the means by which it trades with them. The significant figures are summarized in the preceding table (Table XI).

Comparing the Austrian and the German figures we find that the more distant country does a distinctly smaller business measured in gross tonnage; the value of the German trade is about the same, however, by reason of its superiority in industrial exports, in which value is condensed in a

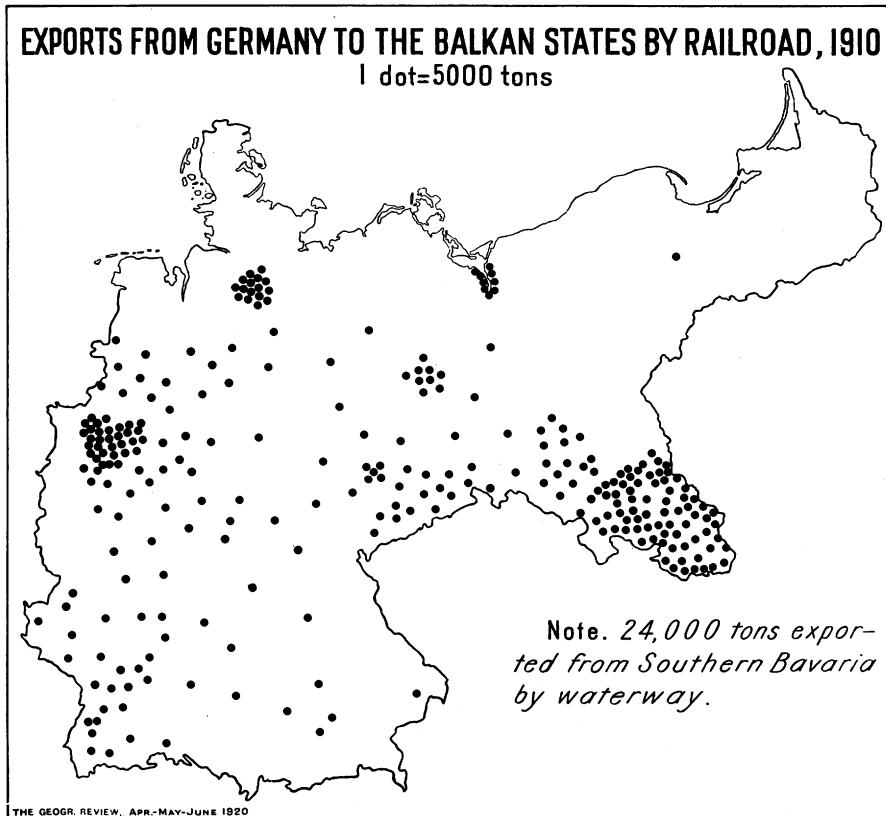


FIG. 3—Cartogram showing the amount and provenance of the exports by railroad from Germany to the Balkan states, 1910.

relatively small bulk. Analyzing the different modes of transport employed we find that internal waterways appears in the third place in both tables and were, naturally, of less importance in Germany than in Austria. The most striking feature is the reversal of the parts played respectively by the railway and by the sea. Of the Austrian trade 72 per cent went by rail and 17 per cent by sea; of the German trade 75 per cent went by sea and 16 per cent by rail. The figures here are based on tonnage, not on value, and would not be so curiously divergent if we had a better economic measure

than that of mere weight. Taking the figures as they stand, however, some obvious conclusions result from them.

#### VALUE OF THE DANUBE RIVER AS A TRADE ROUTE

Germany has an advantage over competitors for Balkan trade in north-western Europe in her ability to make at least some use of the Danube route. It will be noted that Germany actually drew a larger tonnage up the Danube in 1910 than did Austria-Hungary in 1912. More extensive study of the statistics might show this comparison to be exceptional and misleading.

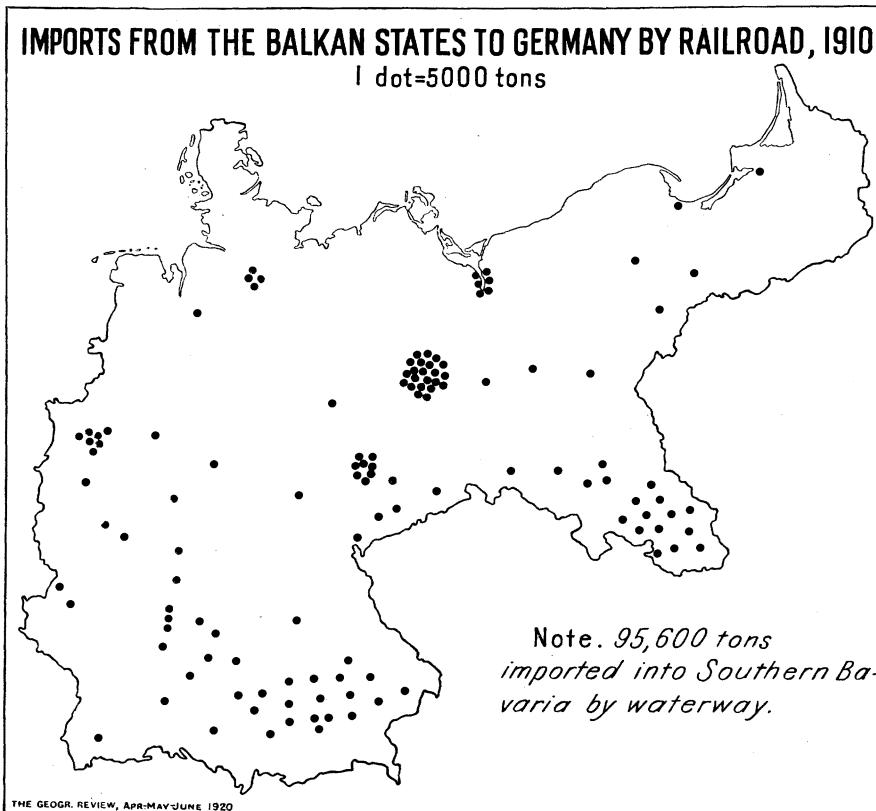


FIG. 4—Cartogram showing the amount and destination of the imports by railroad from the Balkan states to Germany, 1910.

ing. Some reason for it appears, however, in the character of the wares brought by this route; they consisted largely of cereals, for which the demand is more active in southern Germany than in Austria. The exports from Germany by this route were a varied assortment; about half the tonnage was composed of iron and steel and metal wares. One item on the list is of interest because it presents so characteristic an example of the paradoxes of commerce: 800 tons of rice shipped from Bavaria to the Balkans! In general, the wares shipped downstream as well as upstream

seem to have been of the kind that usually would be carried by sea.

A study of the statistics of traffic on the internal waterways of Germany shows that the Danube outlet to the Balkan countries is of importance mainly to southern Bavaria. Not a ton of Balkan freight appears to have passed into or out of the basin of the upper Danube, coming from or going to other German waterways. Even the regions of the Ludwig Canal, the Main, and the Rhine show no water-borne freight movement connecting by the Danube with Balkan countries.

It is possible, of course, that some of the considerable tonnage of iron and steel which went down the Danube reached that river in small canal boats via the Rhine, Main, and Ludwig Canal and was there transferred to river boats. The traffic statistics do not enable us to answer this question. They consider only the immediate, not the ultimate, destination of wares.

#### COMPARATIVE VALUE OF RAIL AND WATER ROUTES IN GERMAN-BALKAN TRADE

Comparing now the waterway and the railway as an instrument to serve German commerce with the Balkans, we find that the railway does twice the work of the waterway, measured in tonnage of wares carried. The peculiar advantage of the railway is its relative independence of natural contours and its ability to follow a fairly straight path into any region that is not actually mountainous. While the Danube serves but a small part of Germany in its Balkan trade, the railway serves all Germany.

This fact stands out clearly when we study the districts in Germany in which most of the Balkan railroad freight arrives and departs (Figs. 3 and 4). The agricultural districts do little or no business with Balkan countries, being indeed their competitors. The industrial districts are the source of most of the outgoing freight to the Balkans, and the incoming freight goes in large part to the consuming population gathered in them and in the large cities.

When we seek to analyze the nature of the trade which Germany carries on with the Balkan countries by sea—three-quarters of the whole—we encounter practical difficulties. We may assume, of course, that all the trade with Greece went by the sea route, and it is safe to assume that most of the trade with Turkey in Europe followed the same course. All of the trade of Serbia was, of course, by land. To Bulgaria and Rumania wares could be shipped by sea or by railway or by internal waterway; we want to know which of these routes was followed by any particular ware and the reason why it chose this particular course. By combining and analyzing the statistics of traffic and of commerce an answer to the question may be obtained which will be approximately correct; but the process is a tedious one, and I shall attempt to present here merely impressions based on a partial study of the figures, not the conclusions of an exhaustive analysis.

In general I have the impression that any given ware might be shipped and was shipped by any one or by all three of the routes. The choice would apparently be determined not by the character of the article, except for such wares as fresh fruit, counting for little in the aggregate; it would be determined by the particular place in which the article originated, by the particular place of its destination, and by the particular time at which it was shipped. For example, the iron product from the region of Oppeln in Silesia went to Rumania by rail; it had a longer rail haul than if it had been taken to a seaport or to the Danube but escaped the costs of trans-shipment and water freight and could probably be laid down nearer the place where it was wanted than would be the case if it had been carried by a water route. Most of the iron that was exported to Serbia seems to have gone down the Danube and was probably distributed from Belgrade. This was probably manufactured in the Ruhr region; and from the same source doubtless went the bulk of the iron wares that were shipped to the peninsula by sea.

#### SEEING ANOMALIES IN FREIGHT ROUTING

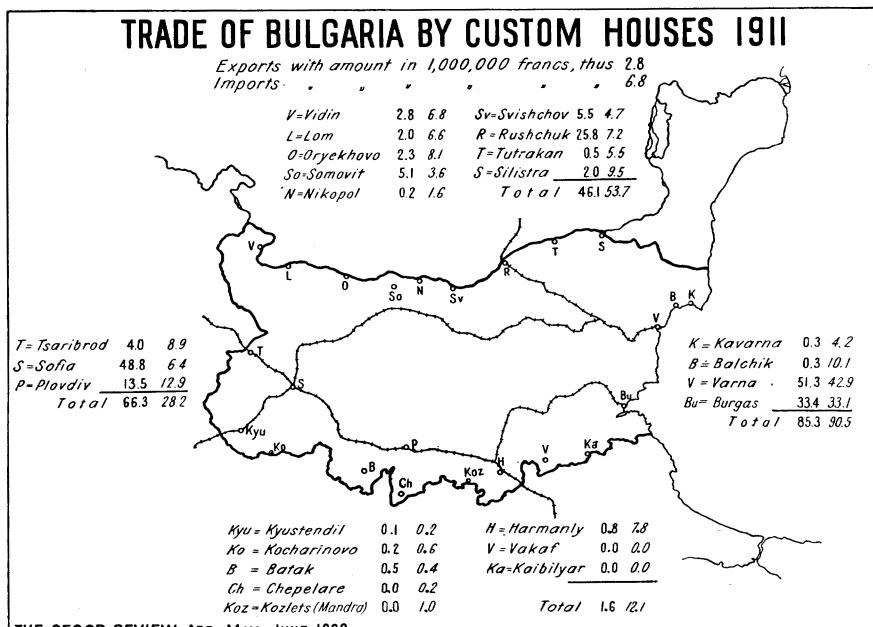
It is disconcerting, however, to find a shipment by rail to Rumania of 2,000 tons of steam boilers and tanks from the Pomeranian harbors, directly on the seaboard; and this example is but one of many that could be given of the defiance of theories by the facts. A reason doubtless lies behind every movement of freight, however insignificant it appears; but the reasons are often obscure because they are local and individual. They may result from the particular circumstances of the time, rather than of the place or of the ware. Part of the freight exchanged by railroad between Germany and the Balkan countries consisted undoubtedly of "rush" shipments. How large a part of the rail traffic was of this sort it is impossible to say. This part of the rail traffic, shipped in response to hurry-up orders, was probably of shifting character, composed at different times of different goods, according to the circumstances.

Furthermore, we must recognize that the influence of economic competition often diverts trade currents into lines which appear unnatural and socially disadvantageous. Much has been written on the service of trusts and similar would-be monopolies in organizing more efficiently the distribution of wares, abolishing the losses of cross-freights, etc.; but there is another side to the picture. Fierce competition, resulting in price cutting, "dumping," etc., will often make trade currents, in appearance, run up hill. A German *kartell*, dominating the market in some particular product, can exercise more influence than lofty mountain chains or level river valleys can exercise on the direction of traffic; and for a considerable period may exercise this influence, to the confusion of commercial geographers. Some German *kartells* have regularly framed their prices so as to counteract transportation charges, charging prices that were lower as regions

were farther away, and so practically annihilating the effects of distance.<sup>11</sup> Foreign territory has usually been left open to the unrestricted competition of the members of a trust and their rivals,<sup>12</sup> but it would certainly be unsafe to assume that in Germany's Balkan trade influences of this kind were wholly wanting.

#### REASONS FOR GERMANY'S DOMINANCE IN BALKAN TRADE

Looking away from the bewildering mass of detail and seeking some general conclusion, I think the following statements are clearly true. Germany has a particular advantage in Balkan trade both in the waterway of the Danube and in the railroad connections which bring her closer than her industrial competitors to the Balkan markets. On the other hand, with



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FIG. 5—Cartogram showing the amount of export and import trade of Bulgaria by custom houses, 1911. (N. B.: The figures for exports and imports should be reversed.)

the choice of ways before her, Germany has carried on only one-fourth (in tonnage) of her Balkan commerce by the Continental route. For three-fourths of the trade she has chosen the open sea.

In two aspects this situation seems to me to be highly significant. In

<sup>11</sup> The Helmstädt-Braunkohlenbrikett-Syndikat furnishes an illustration:

Zone	Price
I . . . . .	61
II . . . . .	56
III . . . . .	51
IV . . . . .	48

Similar practices will be found in the German metal industries. Cf. Hugo Bonikowsky: *Der Einfluss der industriellen Kartelle auf den Handel in Deutschland*, Jena, 1907, p. 150.

<sup>12</sup> Josef Grunzel: *Ueber Kartelle*, Leipzig, 1902, p. 64.

the first place, it indicates that Germany's industrial neighbors, Belgium, France, and England, which appear to be hampered by the greater length of the overland route, are actually better situated than Germany to compete in three-fourths of the Balkan trade which Germany carries on. There is, I think, a fair measure of truth (though not all the truth), in the statement that Germany carries on overland trade with the Balkans because of the *disadvantages* of her position. Part of the German trade takes to the river route and the railroad because the producing and consuming districts

TABLE XII.—GATEWAYS OF BULGARIAN TRADE, 1911 \*  
(Values in millions of francs)

IMPORTS	TOTAL	N	NW	W	SW	SE	E	NE
Orient R. R. ....	66.2	40.8	18.5	0.9	2.3	2.6	0.2	0.7
River ....	46.1	25.9	7.4	1.4	1.4	0.6	7.4	2.0
Sea ....	85.3	21.3	34.0	6.8	6.5	11.2	1.2	4.3
Turkish ....	1.6	0.1	0.0	0.0	0.0	1.5	0.0	0.0
Total.....	199.3	88.1	60.0	9.1	10.5	16.0	8.7	7.0
EXPORTS								
Orient R. R. ....	28.2	18.1	4.3	2.4	1.6	1.6	0.0	0.2
River ....	53.7	10.7	37.4	0.0	4.0	0.1	1.1	0.1
Sea ....	90.5	4.6	47.3	1.5	21.5	15.4	0.1	0.0
Turkish ....	12.1	0.1	0.0	0.0	0.0	12.1	0.0	0.0
Total.....	184.6	33.5	89.1	3.9	27.3	29.2	1.2	0.3
Combined Total....	383.9	121.6	149.1	13.0	37.8	45.2	9.9	7.3

\* Symbols heading the vertical columns have the following significance: N, Austria-Hungary, Germany; NW, England, France, Belgium; W, Italy; SW, Scattering, not otherwise specified; SE, Turkey; E, Rumania; NE Russia.

Custom houses are grouped as follows in the horizontal lines of figures: Orient Railroad includes Tzarebrod, Sofia, Plovdiv (*not* Harmanly); River includes Vidin, Lom, Oryekhovo, Somovit, Nikopol, Svischchov, Rushchuk, Tutrakan, Silistra; Sea includes Kavarna, Balchik, Varna, Burgas; Turkish includes Kyustendil, Kocharino, Chepelare, Harmanly, Vakaf, Kozlets (Mandra) Kabililar.

The table is compiled by grouping figures supplied in *Statistique du Commerce du Royaume de Bulgarie 1911*, Sofia, 1914, Table 14. Figures in the table are merely approximations in gross; considerable discrepancies will appear when the vertical column of totals is checked by the sum of items in the horizontal lines.

in Germany are so far from deep-water harbors that they cannot afford to take the sea route. Manchester and Middlesbrough, Roubaix and Lille are better situated for Balkan trade than Essen and Oppeln, Solingen and Chemnitz.

In the second place, looking at the matter from the standpoint of Balkan countries, these considerations indicate that the first requisite for their commercial prosperity is not a Continental connection by railroad or river but good harbors on the open sea with ready access to the interior. Balkan trade currents flow northwest and north, but they reach their destination by starting in the opposite direction, southeast and south, and make a great curve to reach their final objective.

#### BULGARIA AS AN EXAMPLE FOR THE ANALYSIS OF TRADE CURRENTS

The matter will be more evident if we study in detail the trade currents of a particular Balkan country. Let us take Bulgaria, which is well adapted to our purpose since it has direct railroad and river connections with the

Continent and an outlet through the Black Sea and the Straits. Bulgarian trade statistics fortunately provide the means of analyzing in detail the trade currents flowing in and out through different gateways, and the accompanying table and map (Table XII and Fig. 5) present a compilation from them designed to illustrate this point.

The table shows that Bulgaria depends upon the Orient Railroad for about one-third of its import trade; most of the wares arriving by this route come from Austria-Hungary and Germany, are entered at Sofia, and are consumed in the capital or are distributed from there. Harmanly is a station on this road, but its trade is almost entirely with Turkey, and I have therefore grouped it with the other custom houses on the Turkish frontier. For export purposes the railroad is relatively unimportant.

A slightly larger proportion of the aggregate trade enters and leaves the country by the river ports. Two points are to be noted, however, in judging the significance of the figures under this head in the table. More than half of the import trade of the river ports passed through Ruschuk, which is a connecting point with the Rumanian railroads and which probably received more goods by rail than by water. Furthermore, an analysis of the exports leaving by the river gateways shows that a relatively small part could have gone upstream and that the largest part, destined for Belgium and England, must have gone downstream and been shipped by sea. Even Vidin, for example, which lies only a short distance below the Iron Gate, exported (in thousands of francs) only 275 to Austria-Hungary and only 16 to Germany, while it exported 1,100 to England and 5,298 to Belgium. The Danube serves Bulgaria, evidently, as an outlet to the sea rather than as a means of access to Central Europe.<sup>13</sup>

Even if no allowance be made for the maritime traffic concealed in the figures of trade by the river ports, the statistics of exports and imports by sea take the place of preponderant importance. It should be noted that these figures were compiled at a time when Bulgaria had no access to the Aegean except through Turkish territory. Leaving aside the question of the importance to Bulgaria of the Dedeagach outlet, it is apparent that even the route through the Black Sea, which is apparently so roundabout, was distinctly superior in economic value to the direct connections by rail and river.

A study of the figures of the commerce of Rumania leads to the same conclusion as regards that state.

<sup>13</sup> This conclusion is borne out by the statistics of tonnage and nationality of shipping on the Danube published in the *Annuaire Statistique du Royaume de Bulgarie*.